

Age: 58		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 12/13/12 – 12/19/14	
		Accounting - \$79,686.12	
		Beginning POH - \$4,932.77	
		Ending POH - \$9,444.12	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Conservator - \$3,273.44 (11 staff hours @ \$76/hr. and 25.39 deputy hours @ \$96/hr.)	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Attorney - \$1,250.00 (less than allowed per local rule)	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Bond fee - \$232.96 (ok)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Costs - \$435.00 (filing fees)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Petitioner states that the conservatee is now subject to an LPS conservatorship as of 12/17/14 and therefore her funds can be managed by the Public Guardian under their payee system and this conservatorship is no longer necessary.	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	Petitioner prays for an Order:	
<input type="checkbox"/>	2620	1. Finding that the conservatorship is no longer necessary, and ordering its termination;	
<input checked="" type="checkbox"/>	Order	2. Approving, allowing and settling the second and final account;	
<input type="checkbox"/>	Aff. Posting	3. Authorizing the conservator and attorney's fees and commissions;	
<input type="checkbox"/>	Status Rpt	4. Authorizing the bond fee and costs; and	
<input type="checkbox"/>	UCCJEA	5. Authorizing petitioner to distribute the remaining estate of \$4,252.72 to the Fresno County Public Guardian as payee of the LPS conservatee.	
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF

Reviewed on: 02/10/15

Updates:

Recommendation:

File 1 - McBride

2A Wanda H. Bingham (CONS/PE)

Case No. 11CEPR00949

Atty Krause, Stephanie J. (for Randy Grace – Petitioner and Co-Trustee of Trust)
 Atty Magness, Marcus D. (also for Randy Grace – Petitioner and Co-Trustee of Trust)
 Atty Roberts, David A. (for Joan St. Louis – Former Conservator)
 Atty Boyett, Deborah K. (Court appointed attorney for Conservatee Wanda H. Bingham)
 Atty Burnside, Leigh W. (for Wells Fargo Bank, N.A. – Co-Trustee of Trust)

Petition for Appointment of Successor Probate Conservator of the Person and
 Estate (Prob. C. 1820, 1821, 2680-2682)

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			Court Investigator advised rights on 10-31-14 and 11-5-14
Cont 111914, 121514			Voting right affected – Need minute order.
	Aff.Sub.Wit.		
✓	Verified		<p><u>Note:</u> Page B is the corresponding Petition for Removal of current conservator; however, the Order Granting Conservator Leave to Resign as Conservator of the Person and Estate was entered 12-4-14 and the Court accepted Ms. St. Louis' resignation as of Midnight on 12-31-14. See also Ms. St. Louis' Resignation filed 1-6-15.</p> <p><u>Note:</u> A Petition for Order to Pay Attorney Fees was filed 1-15-15 by Temp. Conservator Randy Grace that is set for hearing on 2-19-15.</p> <p><u>SEE ADDITIONAL PAGES</u></p>
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2-10-15
			Updates:
			Recommendation:
			File 1A - Bingham

2A

NEEDS/PROBLEMS/COMMENTS: The following issues remain noted:

1. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham. The Court may require direct notice to the Conservatee pursuant to Probate Code §§ 1460(b) and 1214 and Cal. Rules of Court 7.51(c).
2. Petitioner has filed bond of \$485,578.45; however, based on the estimated value of the estate, Examiner calculates that bond should be at least \$550,236.52, which includes cost of recovery pursuant to Probate Code § 2320(c)(4) and Cal. Rule of Court 7.207.

Note: The estimated value of the estate appear to be based on the accounting filed by the current conservator, which has been denied. The Court has ordered that an amended account be filed by 3-16-15.

3. The Petition at #1k requests orders related to dementia medication and placement; however, the separate Attachment Requesting Special Orders Regarding Dementia (Mandatory Judicial Council Form GC-313) was not attached to the petition or served on interested parties, and the proposed order does not specify dementia medication and placement powers.

Examiner notes that the additional medical consent and dementia medication and placement powers requested herein were originally granted to the original conservator, David St. Louis; however, additional orders were made pursuant to agreement reached at Court Trial on 12-6-11 and Order After Hearing Regarding Placement filed 12-13-11.

The 12-13-11 Order specifies that care providers for Byrum Bingham (now deceased) and Wanda Bingham are to be present inside the main residence 24 hours per day; that Wanda Bingham is to abide by the dietary and nutrition guidelines recommended by her treating physician, and that the keys to the automobile are to be kept in the possession of the care providers or the conservator, David St. Louis.

Examiner is not aware without extensive further review of the file whether subsequent agreements or orders were made regarding Mrs. Bingham's care and placement after Mr. Bingham's death, or after Mr. St. Louis' death. The Court may require clarification.

2B Wanda H. Bingham (CONS/PE)**Case No. 11CEPR00949****Atty Krause, Stephanie J. (for Randy Grace – Petitioner and Co-Trustee of Trust)****Atty Magness, Marcus D. (also for Randy Grace – Petitioner and Co-Trustee of Trust)****Atty Roberts, David A. (for Joan St. Louis – Conservator)****Atty Boyett, Deborah K. (Court appointed attorney for Conservatee Wanda H. Bingham)****Atty Burnside, Leigh W. (for Wells Fargo Bank, N.A. – Co-Trustee of Trust)****Petition for Removal of Conservator of Person and Estate of Wanda H. Bingham,
and for Costs, Expenses and Attorney Fees**

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Note: The Order Granting Conservator Leave to Resign as Conservator of the Person and Estate was entered 12-4-14 and the Court accepted Ms. St. Louis' resignation as of Midnight on 12-31-14. See also Ms. St. Louis' Resignation filed 1-6-15. 4. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the Conservatee and the current Conservator pursuant to Probate Code §§1460(b) and 1214 and Cal. Rules of Court 7.51(c).
Cont from 111914, 121414			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2-10-15
			Updates:
			Recommendation:
			File 1B - Bingham

2B

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 5. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham. The Court may require direct notice to the Conservatee pursuant to Probate Code §§1460(b) and 1214 and Cal. Rules of Court 7.51(c).
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skC	
			Reviewed on: 2-10-15	
			Updates:	
			Recommendation:	
			File 2 - Bingham	

Order to Show Cause RE: Failure to Appear and Failure to Filed an Account

DOD: 12/18/12	KEVIN HUDGINS and DANIELL DUTRA were appointed Co-Executors with Full IAEA without bond and Letters issued on 2-7-13.	NEEDS/PROBLEMS/COMMENTS: Note: First & Final Report of Administration and Petition for Distribution filed 02/13/15 and set for hearing on 03/25/15.
Cont. from	On 2-7-13, the Court set status hearing for the filing of the first account or petition for final distribution for 4-11-14.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.	On 4-11-14, there were no appearances. Mr. Shepard was ordered to be personally present on 5-23-14.	
Notice of Hrg	On 5-23-14, there were no appearances. The matter was continued to 7-15-14 and Mr. Shepard was again ordered to be personally present.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	On 07/15/14, Mr. Shepard appeared and the status hearing was continued to 10/31/14.	
Conf. Screen	Status Report filed 10-20-14 (not verified) states there are multiple outstanding creditor's claims against the estate and the Co-Executors are continuing their attempt to arrange payment so that the estate can be closed and distributed. Mr. Shepard respectfully requests that the Court extend the time for filing the first and final report of administration.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting	On 10/31/14, there were no appearances and the matter was continued to 01/29/15.	
Status Rpt		
UCCJEA		
Citation	On 01/29/15, there were no appearances. Minute Order from 01/29/15 states: The Court issues an Order to Show Cause to Jeff Shepard, Kevin Hudgins, and Danielle Dutra for failure to appear and failure to file an account. All parties are ordered to be personally present in court on 02/19/15. Clerk's Certificate of Mailing indicates that a copy of the 01/29/15 Minute Order was mailed to Jeff Shepard on 01/29/15.	
FTB Notice		
		Reviewed by: JF Reviewed on: 02/10/15 Updates: 02/17/15 Recommendation: File 3 - Hudgins

(1) First and Final Report of Administrator on Waiver of Account and Petition for its Settlement; (2) for Allowance of Statutory and Extraordinary Fees to Attorney for Services; and (3) for Order for Final Distribution Pursuant to Probate Code 3600 et. seq.

DOD: 3/31/10	JOSEPH WILLIAM MARTIN , Administrator, is petitioner.		NEEDS/PROBLEMS/COMMENTS: Continued from 10/20/14. As of 2/10/15 the following issues remain:
	Accounting is waived.		
Cont. from 082514 090814, 102014	I & A	-	\$125,873.74
	POH	-	\$127,424.94
<input type="checkbox"/> Aff.Sub.Wit.	Administrator	-	waives
<input checked="" type="checkbox"/> Verified	Attorney	-	\$4,776.22
<input checked="" type="checkbox"/> Inventory	(statutory)		
<input checked="" type="checkbox"/> PTC	Attorney x/o	-	\$9,100.00
<input checked="" type="checkbox"/> Not.Cred.	(40.75 hours @ \$100 – 250/hr for services in connection with the civil litigation and creation of the special needs trust)		
<input checked="" type="checkbox"/> Notice of Hrg	W/		
<input checked="" type="checkbox"/> Aff.Mail	Costs	-	\$1,304.32
<input type="checkbox"/> Aff.Pub.	(probate Referee, publication, certified copies)		
<input type="checkbox"/> Sp.Ntc.	Petitioner states he established the JOSEPH W. MARTIN IRREVOCABLE SPECIAL NEEDS TRUST , ("SNT") dated 1/16/14, Donald Fischer, trustee. The SNT currently contains proceeds from the settlement of the civil litigation by order of the Honorable Kristi Culver-Kapetan in the matter entitled <i>Joseph W. Martin v. Mary Quin, et. al</i> , case no. 12CECG03130 filed on 4/2/14.		
<input type="checkbox"/> Pers.Serv.	Petitioner requests the court take judicial notice of the order.		
<input type="checkbox"/> Conf. Screen	Please see additional page		
<input checked="" type="checkbox"/> Letters	4/2/13		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			
			Reviewed by: KT
			Reviewed on: 2/10/15
			Updates:
			Recommendation:
			File 4A - Martin

Petitioner request the assets of the estate be distributed to Donald E. Fischer, Trustee of the Joseph W. Martin Irrevocable Special Needs Trust dated 1/16/14.

NEEDS/PROBLEMS/COMMENTS (cont.):

3. Extra ordinary fee requests appear to include attorney services that benefited the administrator, Joseph Martin, personally and not the estate. For instance, Mr. McCloskey states he assisted Mr. Martin in a civil case for financial elder abuse against his daughter, Mary J. Quin entitled *Joseph W. Martin v Mary J. Quin*, case no. 12CECG03130. The action sought to recover assets Mr. Martin alleged were fraudulently taken by his daughter, Mary J. Quin. Mr. Martin was represented by Attorney Babette Fischer in the civil matter and not Mr. McCloskey. Mr. McCloskey also states he assisted in the creation of the Special Needs Trust for Mr. Martin. The special needs trust would be solely for the benefit of Mr. Martin and not for the benefit of the estate. In addition, there are questions regarding the validity of the Special Needs Trust. It appears any attorney fees incurred by the civil case or for Mr. Martin personally should be recovered from Mr. Martin personally outside of the estate. California Rules of Court, Rule 7.702(3) requires the declarant to show the benefit of the services to the estate. - **Declaration of Attorney Daniel T. McCloskey filed on 8/15/14 states** he feels the extraordinary fees are justified due to the unusual circumstances presented by the case, including but not limited to; preparation, filing and related actions to create the Special Needs Trust; preparation and filing and prosecution of the Petition to Determine Title; protracted civil litigation regarding the Petition to Determine Title and Petitioner's physical incapacity and mobility issues after his fall requiring travel to and from the convalescent home and hospital; that the misconduct alleged by his daughter occurred in 2010 and that it was his only daughter, a licensed attorney, who aggressively defended against the complaint and petition.

Status Report filed on 10/10/14

Status Report filed on 2/11/15

Order to Show Cause RE: Failure to Appear and Failure to File and Account

DOD: 4-20-13	KEVIN HUDGINS and DANIELLE DUTRA	NEEDS/PROBLEMS/COMMENTS:
	were appointed as Co-Executors with Full IAEA without bond on 8-29-13.	
	Letters issued on 9-4-13.	Note: First & Final Report of Administration and Petition for Distribution filed 02/13/15 and set for hearing on 03/25/15.
Cont. from		
Aff.Sub.Wit.	At the hearing on 8-29-13, the Court set a status hearing on 10/31/14 for the filing of the first account or petition for final distribution.	
Verified		
Inventory		
PTC		
Not.Cred.	Status Report (unverified) filed 10-21-14	
Notice of Hrg	states the first and final account is in the process of being prepared for filing. Due to the complexities involved in this estate and the companion estate of the decedent's daughter, Victoria L. Hudgins, together with the obligation of owning and operating Page Funeral Chapel in Selma, the Executors have limited time to deal with matters of the estate. The attorney respectfully requests that the Court extend the time for filing the first and final account.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp	On 10/31/14, there were no appearances and the status hearing was continued to 01/29/15.	
Objections		
Video Receipt		
CI Report		
9202		
Order	On 01/29/15, there were no appearances. Minute Order from 01/29/15 states: The Court issues an Order to Show Cause to Jeff Shepard, Kevin Hudgins, and Danielle Dutra for failure to appear and failure to file an account. All parties are ordered to be personally present in court on 02/09/15. Clerk's Certificate of Mailing states that a copy of the 01/29/15 Minute Order was mailed to Jeff Shepard on 01/29/15.	
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 02/10/15
UCCJEA		Updates: 02/17/15
Citation		Recommendation:
FTB Notice		File 5 - Page

6

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/17/2013	LOUISE BAKER , was appointed Executor with full IAEA authority without bond on 01/27/2014.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 08/19/2014: Estate appears to be without assets except for allegations of life insurance proceeds. Beneficiary was changed online days before Ms. Ello's death. 1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Note: Status Hearing for the filing of the First Account or Final Distribution is set for 03/06/2015 per minute order of 01/06/2014.
	Letters issued on 01/28/2014.	
	Minute Order of 01/06/2014 set this status hearing for the filing of the Inventory and Appraisal.	
Cont. from 060614, 070114, 081915	Former Status Report filed 08/11/2014 states Attorney Calhoun failed to transfer over the hearing of 07/01/2014 due to a change in his calendaring. He and the executrix, Louise Baker, have done an extensive search and found that the estate has no property. However, on review of the events leading up to and during the investigation, it was determined that an individual had changed the beneficiary of the decedent's life insurance three days before her death. The case number of the probate has been used in discovery attempts to determine how such action was taken. As can be seen by the decedent's death certificate, Ms. Ello was in the hospital, and had been for over a month prior to her death. Therefore, with the changing of her beneficiary, it does not appear proper.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV Reviewed on: 02/11/2015 Updates: Recommendation: File 7 - Ello

(1) First and Final Account and Report of Co-Executors and (2) Petition for Its Settlement, for (3) Confirmation and Approval of Acts of Co-Executors, for (4) Allowance of Compensation to Co-Executors for Ordinary Services, for (5) Allowance of Compensation to Attorneys for Ordinary and Extraordinary Services, and for (6) Final Distribution

DOD: 1/22/2014		PAMELA J. STEVENSON and EMMA RAE HANSEN , Co-Executors, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/22/14 – 12/26/14	
Cont. from		Accounting - \$288,701.08	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$251,838.68	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$183,651.38	
<input checked="" type="checkbox"/>	Inventory	Executors - \$8,774.03 (statutory, \$4,387.02 each)	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Attorney - \$8,774.03 (statutory)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney X/O - \$2,512.50 (for sale of real property, 11.50 hrs @ \$125-\$250 per hour)	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.	Costs - \$173.74 (probate referee)	
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	Closing - \$3,017.10	
	Duties/Supp		
	Objections	Distribution, pursuant to Decedent's Will, is to:	
	Video Receipt	Emma Rae Hansen - \$40,100.00	
	CI Report	DaDeen Creed - \$40,100.00	
<input checked="" type="checkbox"/>	9202	Marta Peterson - \$16,040.00	
<input checked="" type="checkbox"/>	Order	Brent H. Nay - \$16,040.00	
	Aff. Posting	Jill Gourley - \$16,040.00	
	Status Rpt	Deena Nay - \$16,040.00	
	UCCJEA	Ludell Nay - \$16,040.00	
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 2/11/15
			Updates:
			Recommendation:
			File 8 - Nay

Age: 59		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:		
		<p>DONNA CARREIRO and PAUL CARREIRO, sister and brother-in-law, are Petitioners and request that the PUBLIC GUARDIAN be appointed as Conservator of the Person and Estate without bond.</p> <p>Estimated Value of the Estate: Personal property - \$2,500.00</p> <p>Petitioners state that the proposed conservatee suffers from mental health issues and is unable to keep her home properly clean and in a liveable state. Petitioners believe that the proposed conservatee's health is good other than her mental health issues. Petitioner state that the proposed conservatee will not seek help for her mental health problems and refuses to take the medication that is prescribed to her due to irrational beliefs. The proposed conservatee lives alone in a home presently owned by her father's trust, she is also the beneficiary of her father's trust as well as an IRA. A family friend currently delivers groceries to the proposed conservatee. Petitioners also state that the proposed conservatee will give away money despite her own needs and that she is eligible for Medi-Cal and social security disability but is not capable of completing the applications and obtaining the necessary doctor's reports due to her mental health issues.</p> <p>Court Investigator Dina Calvillo filed a report on 01/12/15.</p>		<p>CONTINUED FROM 01/15/15 Minute Order from 1/15/15 states: Counsel requests to bifurcate the issue of person and estate. Ms. Kruthers requests time to see if a probate conservatorship is appropriate. The Petition is granted as to the estate ONLY. Matter is continued to 02/09/15 as to the person ONLY. Mr. Rindlisbacher will submit a new order.</p> <p>Proposed Conservatee has not been advised of her rights.</p> <p>Letters of Conservatorship of the Estate issued on 02/03/15.</p>		
Cont. from 011515						
	Aff.Sub.Wit.					
✓	Verified					
	Inventory					
	PTC					
	Not.Cred.					
✓	Notice of Hrg					
✓	Aff.Mail					w/
	Aff.Pub.					
	Sp.Ntc.					
✓	Pers.Serv.					w/
	Conf. Screen					n/a
	Letters					x
	Duties/Supp					n/a
	Objections					
	Video Receipt					n/a
✓	CI Report					
	9202					
✓	Order					
	Aff. Posting					
	Status Rpt					
	UCCJEA					
✓	Citation					
	FTB Notice					

Reviewed by: JF	
Reviewed on: 02/10/15	
Updates:	
Recommendation:	
File 9 - Skopec	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age:			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> Calendared in Error. Hearing scheduled for 2/18/15.</p>
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: KT</p> <p>Reviewed on: 2/10/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 - Lopez</p>

DOD: 6-12-06		STARLING BONE , Surviving Spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		No other proceedings	1. The original will has not been deposited with the Court pursuant to Probate Code §8200.
Cont. from 020315		Will dated 7-7-04 devises entire estate to Petitioner.	2. Petitioner does not provide any information regarding her marriage to the decedent and acquisition of the real property in order for the Court to confirm her 50% community property interest in the real property. The Court may require a verified declaration containing this information.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2-10-15
			Updates:
			Recommendation:
			File 11 - Bone

			See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-11-15	
			Updates:	
			Recommendation:	
			File 13 - Strum	

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 11/28/2014		CRAIG COSTI , brother is petitioner and requests appointment as Administrator with bond fixed at \$100,000.00.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Receipt of Bond filed in the amount of \$100,000.00 on 01/26/2015	1. Need Affidavit of Publication.
<input type="checkbox"/>	Aff.Sub.Wit.		2. Petitioner is not listed on #8 of the petition as required.
<input checked="" type="checkbox"/>	Verified	Full IAEA - ?	
<input type="checkbox"/>	Inventory	Decedent died intestate	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Residence: Kingsburg	
<input checked="" type="checkbox"/>	Notice of Hrg	Publication: Need	Note: Since the Receipt of Bond was filed no Status Hearing was provided for the filing of the Receipt of Bond.
<input checked="" type="checkbox"/>	Aff.Mail	Estimated value of the Estate	Note: If the petition is granted status hearings will be set as follows:
	Aff.Pub.	Personal property - \$2,000.00	• Thursday, 06/18/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u>
	Sp.Ntc.	Real property - \$91,000.00	• Thursday, 04/21/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
	Pers.Serv.	Total - \$93,000.00	
	Conf. Screen	Probate Referee: Rick Smith	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		Reviewed by: LV
	Status Rpt		Reviewed on: 02/11/2015
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 14 - Costi

Petition for Probate of Will and for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 07/10/2014	SUSAN TURNER , daughter is petitioner and requests appointment as Administrator without bond.		NEEDS/PROBLEMS/COMMENTS: 1. Proposed personal representative is a resident of Colorado. Probate Code § 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court. Note: If the petition is granted status hearings will be set as follows: • Thursday, 03/19/2015 at 9:00am in Dept. 303 for the filing of the Bond. Thursday, 06/18/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 04/21/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	Petitioner is a resident of Craig, Colorado.		
Cont. from	All heirs waive bond.		
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.		
<input checked="" type="checkbox"/> Verified	Decedent died intestate.		
<input type="checkbox"/> Inventory	Residence: Fresno		
<input type="checkbox"/> PTC	Publication: The Business Journal		
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/	Estimated value of the Estate	
<input checked="" type="checkbox"/> Aff.Pub.		Personal property - \$12,000.00	
<input type="checkbox"/> Sp.Ntc.		Real property - \$215,000.00	
<input type="checkbox"/> Pers.Serv.		Less encumbrances -\$96,577.00	
<input type="checkbox"/> Conf. Screen		Total - \$243,423.00	
<input checked="" type="checkbox"/> Letters		Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Reviewed by: LV
Reviewed on: 02/11/2015
Updates:
Recommendation:
File 15 - Melville

Probate Status Hearing RE: Filing of the First Account or Petition for Final Distribution

DOD: 5/3/2001	PATRICIA CURRY-TAYLOR was appointed Executor with full IAEA and without bond on 7/18/2006.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 7/18/2006.	
Cont. from	First account or petition for final distribution was due September 2007.	<p>1. Need first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Aff.Sub.Wit.	Inventory and Appraisal, partial no. 1. Filed on 9/4/14 show a value of \$140,034.22.	
Verified	Inventory and Appraisal, final, filed on 12/4/14 shows a value of \$165,768.59.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 2/11/15
		Updates:
		Recommendation:
		File 16 - Hollier

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 5/8/14	<p>GLEN R. BLUE was appointed Administrator with full IAEA authority and without bond on 10/9/14.</p> <p>Letters issued on 10/9/14.</p> <p>Minute order dated 10/9/14 set this status hearing for the filing of the inventory and appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> Inventory and Appraisal filed on 2/11/15.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: KT</p> <p>Reviewed on: 2/11/15</p> <p>Updates: 2/17/15</p> <p>Recommendation:</p> <p>File 17 - Blue</p>		

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Page 19 is a related case. Minute Order 1-8-15: Esmeralda Mendez is sworn to interpret in the Spanish language. The Notice of Hearing was filed on 12-3-14 and the petition is orally verified in open court. The Court orders Ms. Chavez to pay the filing fees owed and submit an order for the accounting. Cont. to 2-19-15 at 9:00 am in Dept. 303. <u>Note:</u> As of 2-10-15, an order has not been submitted. 1. Need Order.	
Cont from 082114, 100914, 111314, 010815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-10-15	
			Updates:	
			Recommendation:	
			File 18 – Mendez	

Second Accounting

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Please see related case on page 18. <u>Minute Order 1-8-15:</u> Esmeralda Mendez is sworn to interpret in the Spanish language. The Notice of Hearing was filed on 12-3-14 and the petition is orally verified in open court. The Court orders Ms. Chavez to pay the filing fees owed and submit an order for the accounting. Cont. to 2-19-15 at 9:00 am in Dept. 303. <u>Note:</u> As of 2-10-15, an order has not been submitted. 2. Need Order. <u>Note:</u> The Court will set a status hearing for the filing of the next account as appropriate.	
Cont. from 082114, 100914, 111314, 010815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-10-15	
			Updates:	
			Recommendation:	
			File 19 - Chavez	

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Atty Gonzalez, Lilia (Pro Per – Paternal Grandmother – Petitioner)

Atty Figueroa, Sofia Carrillo (Pro Per – Maternal Grandmother – Guardian)

Petition for Visitation

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<p><u>Minute Order 1-8-15:</u> Lupe Mendez is sworn to interpret in the Spanish language; Ms. Gonzalez is advised to bring her own interpreter to the next hearing. The Court orders the Court Investigator to check on the welfare of the minors and provide the paperwork regarding this hearing to the guardian. Cont. to 021915 900 303.</p> <p><u>Note:</u> As of 2-10-15, nothing further has been filed.</p> <p>1. Petitioner filed a declaration of due diligence regarding the guardian. The Court may require further diligence for notice of hearing to be served.</p>
Cont from 010815			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2-10-15
			Updates:
			Recommendation:
			File 21 – Silva & Gonzalez

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

TEMPORARY DENIED 09/09/2014

Please see petition for details.

Cont. from 102814,
121814

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
	Aff.Mail	x
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	
	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

NEEDS/PROBLEMS/COMMENTS:

Minute Order of 12/18/2014: Examiner notes are provided to the petitioner. Mr. Todd objects to the petition. Mr. Todd is directed to file written objections.

No written objections have been filed.

The following issues remain:

1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
 - Devron Todd (Father)

Note: Personally served on 12/11/2014 only 7 days prior to the Court hearing and not the required 15 days prior to the hearing.

 - Devine Blessing Todd (Minor)
2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
 - Michael Todd (Paternal Grandfather)
 - Dortha Ross (Paternal Grandmother)
 - Willie Lee Harris (Maternal Grandfather)
 - Benona Gardner (Maternal Grandmother)
 - Siblings over 12 years of age
3. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed. Need declaration with page #5 attached.

Reviewed by: LV

Reviewed on: 02/11/2015

Updates:

Recommendation:

File 22 – Todd

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 06/01/2011		JOHN I. CHAGOYA , son, and PHILLIP CHAGOYA , grandson, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	
Cont. from 101414, 111314, 010815		No other proceedings	
	Aff.Sub.Wit.	I&A - \$60,000.00	
✓	Verified	Will dated: 01/29/1999 devises all property, both real and personal, to John I Chagoya and Phillip Chagoya in equal shares.	
✓	Inventory		
	PTC		
	Not.Cred.	Petitioners request Court determination that decedent's 100% interest in real property located at 1085 South Hope Reedley, California pass to John I Chagoya and Phillip Chagoya in equal shares pursuant to decedent's will.	
✓	Notice of Hrg		
✓	Aff.Mail w/		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV
			Reviewed on: 02/11/2015
			Updates:
			Recommendation: Submitted
			File 23 - Chagoya

24 **Chrissy Scott & Rebecca Scott (GUARD/P)**
Atty Shambouger, Shawna (Pro Per – Petitioner – Maternal Aunt)
Atty Shambouger, Eric (Pro Per – Petitioner – Maternal Uncle)
Atty Scott, Andrew (Pro Per – Petitioner – Maternal Grandfather)

Case No. 14CEPR00993

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

TEMPORARY EXPIRES 02/19/2015			NEEDS/PROBLEMS/COMMENTS:
<u>Please see petition for details</u>			
Cont. from 010815			Minute Order of 01/08/2015: Examiner notes handed in open court; matter continued to allow the defects to be cured. 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> Paternal Grandparents (Unknown) Note: proof of service by mail was served on Gary Keith Burkard and Melvena Lockyer on 01/26/2015 however it is unclear who these individuals are.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail	x	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	n/a	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 02/11/2015
			Updates:
			Recommendation:
			File 24 - Scott

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		<u>TEMPORARY EXPIRES 2/19/15</u>	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Shyawn Williams (mother) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Paternal grandparents b. Vershon Williams (maternal grandfather)
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
		Court Investigator Report filed on 2/11/15	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
Objections			
Video Receipt			
✓	CI Report		
9202			
✓	Order		
Aff. Posting			
Status Rpt			
✓	UCCJEA		
Citation			
FTB Notice			
			Reviewed by: KT
			Reviewed on: 2/11/15
			Updates:
			Recommendation:
			File 25 - Henderson

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Pursuant to Proof of Service filed 2-11-15, the mother was served with Notice of Hearing, but without a copy of the petition. The Court may require further service.</p> <p>2. Notice of Hearing filed 2-11-15 includes service on someone named Jack Lilles, but it is unclear from the file who this person is. Is this the maternal grandfather?</p> <p><u>Note:</u> The minute order of 1-6-15 indicates that someone named Lawrence Buckner was present, but it is unclear from the file who this person is.</p>
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report	X		
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 2-11-15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 26 - Austin</p>	

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Mary Lou Hernandez (CONS/PE)**Case No. 15CEPR00130**

Atty

Bagdasarian, Gary G. (for Michelle Ann Torres – Daughter – Petitioner)

Atty

Horton, Lisa (Court appointed for proposed Conservatee)

Petition for Appointment of Temporary Conservatorship of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 2-10-15.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-11-15	
			Updates: 2-17-15	
			Recommendation:	
			File 27 - Hernandez	

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